

## Message Text

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ORIGIN AGR-20

INFO OCT-01 AF-10 NEA-10 ADP-00 EB-11 COME-00 TRSE-00

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APPROVED BY: EB/ FTD: H M PHELAN JR

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NEA/ EGY: SHANLEY

AF/ E: EJSCHREIBER

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FM SECSTATE WASHDC

TO USINT CAIRO

AMEMBASSY KHARTOUM

AMEMBASSY DAR ES SALAAM

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E . O. 11652: N/ A

TAGS: EAGR EG SU TZ

SUBJECT: 1973-74 COTTON ACREAGE

1. EACH YEAR AT THIS TIME, WE MUST PREPARE PRELIMINARY ESTIMATES OF WORLD COTTON PRODUCTION DURING THE COMING MARKETING YEAR ( AUGUST- JULY). THESE ESTIMATES ARE USED IN PREPARING SOME ASPECTS OF USDA BUDGET AND ARE ALSO AN IMPORTANT PART OF BASIC DATA WE MAKE AVAIL- ABLE TO U. S. PRODUCERS TO ASSIST THEM IN MAKING THEIR PRODUCTION DECISIONS.
2. PROCEDURE USUALLY FOLLOWED IS TO ESTIMATE FOREIGN NON- COMMUNIST ( FN/ C) ACREAGE ON BASIS PRICE LEVELS AT PLANTING TIME PLUS ANY OTHER RELEVANT FACTORS, AND ASSUME YIELDS IN LINE WITH LONG- TERM TREND ( MARGINAL INCREASE EACH YEAR). LIKELY LEVEL OF PRODUCTION IN COM- UNCLASSIFIED

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MUNIST COUNTRIES DETERMINED ON MORE SUBJECTIVE BASIS.

3. CURRENT INTERNATIONAL COTTON PRICES AT VERY ATTRACTIVE LEVELS AND WOULD NORMALLY TRIGGER INCREASE IN PLANTED ACREAGE IN FN/ C COUNTRIES. HOWEVER, BECAUSE OF RECENT INCREASES TO RECORD LEVEL AND PRESSURE ON AVAILABLE LAND FOR FOOD CROPS, WE BELIEVE FN/ C COTTON ACREAGE LIKELY TO REMAIN AROUND 1972-73 RECORD LEVEL. SMALL INCREASE IN YIELD SHOULD PRODUCE SAME RESULT IN PRODUCTION, PERHAPS ADDITIONAL 200,000 BALES.

4. OUR PRELIMINARY THINKING IS THAT COTTON ACREAGE IN COMMUNIST COUNTRIES LIKELY REMAIN RELATIVELY UNCHANGED IN 1973-74 FROM LAST YEAR. WE ANTICIPATE THAT A SMALL DROP IN RUSSIAN YIELD FROM EXTREMELY FAVORABLE LEVEL OF 1972-73 AND RETURN TO 1971-72 YIELD IN CHINA WILL AGGREGATE INCREASE IN PRODUCTION BOTH COUNTRIES OF PERHAPS 3/4 MILLION BALES.

5. THESE ESTIMATES WOULD MEAN INCREASE IN FOREIGN PRODUCTION NEXT YEAR OF PERHAPS ONE MILLION BALES. HOWEVER, WE HAVE INFORMALLY DISCUSSED THESE ESTIMATES WITH A NUMBER OF WELL- INFORMED INTERNATIONAL MERCHANTS, SOME OF WHOM HAVE ATTEMPTED MAKE THEIR OWN ASSESSMENT ON BASIS THEIR TRADE CONTACTS. SEVERAL HAVE EXPRESSED BELIEF OUR ESTIMATES ARE TOO HIGH BECAUSE THEY DO NOT GIVE ENOUGH IMPORTANCE TO STRONG COMPETITION FOR LAND FROM OTHER CROPS, MANY OF WHICH ARE ALSO AT VERY ATTRACTIVE PRICE LEVELS.

6. WE NEED YOUR HELP ON THIS DIFFICULT TASK AND REQUEST YOU FURNISH BEST ESTIMATE OF 1972-73 COTTON ACREAGE AND FORECAST FOR 1973-74 FOR HOST COUNTRY. COMMENTS ON YIELD PROSPECTS FOR 1973-74 WOULD ALSO BE HELPFUL.

7. WE RECOGNIZE ADDRESSEE POSTS HAVE ONLY MARGINAL RESPONSIBILITY FOR COTTON REPORTING BUT EGYPT, SUDAN, AND TANZANIA ARE IMPORTANT COTTON PRODUCING COUNTRIES. ACCORDINGLY, ANY HELP YOU CAN PROVIDE WILL BE GREATLY APPRECIATED.

8. FOR MAXIMUM VALUE, NEED YOUR REPLY BY MONDAY, MARCH 19, OR AS SOON THEREAFTER AS POSSIBLE. ROGERS

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